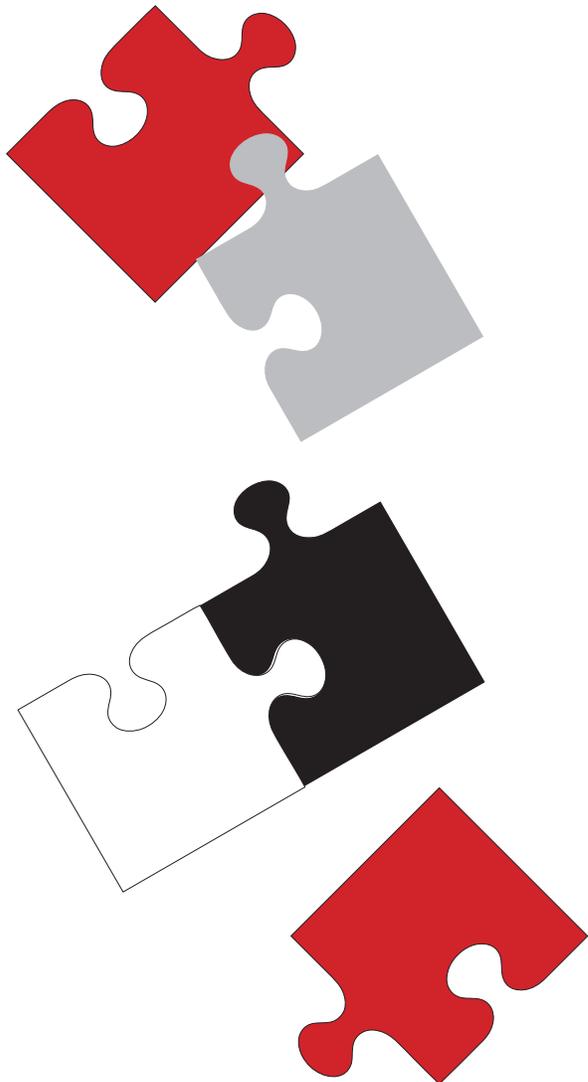


Southern Employee Benefits Conference

2012 Annual Educational Conference

April 17, 2012 | Château Élan

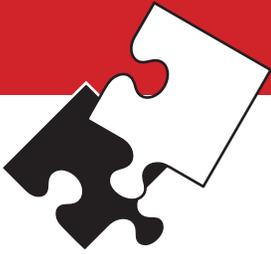


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WELCOME TO THE 2012 ANNUAL EDUCATIONAL CONFERENCE

Thank you for joining us at the SEBC's annual Spring Educational Conference. As President of the Steering Committee, it has been a great privilege to work with all of the selfless and dedicated volunteers who make the SEBC run. Today's program is the culmination of many hours of planning. We are proud to present a timely and comprehensive set of topics and an accomplished array of speakers. We hope you find the conference thought-provoking and professionally rewarding.

The SEBC is now in its 43rd year. Over that time, it has become one of the best recognized and respected membership-based employee benefits educational organizations in the country. We have members from 15 states and Washington, DC who represent a wide array of disciplines within the employee benefits field. Like all organizations, we have had to adapt to changing times and trends. In recent years we have taken steps to improve the SEBC's financial condition, increase our membership and expand our range of activities. For example, we have revamped our administrative structure to reduce expenses and increase efficiency. In addition, we have been increasing corporate sponsorships both from organizations with a long history of supporting the SEBC and from companies who are new to the SEBC. We have re-energized our membership base, adding a number of new members in recent years. Finally, we are partnering with the Atlanta chapter of the Society for Human Resources Management to conduct a joint educational conference later this year.

These initiatives have been ably spearheaded by our Executive Director, Anne McKillips. Anne's enthusiasm, determination and unflagging effort have played a central role in our recent successes. If you do not already know Anne, I promise that you will before the end of the conference.

I would also like to extend a special thanks to the sponsors of this event and of the SEBC as a whole. Sponsorships are part of the SEBC's "life blood." They enable us continue to provide members with the highest quality educational meetings at the lowest cost. We hope all of you will consider sponsoring the SEBC and future events. More information about sponsorships can be found at www.SEBC.org or by contacting David Lyons, our Fundraising Committee chair.

As in prior years, the Fall Fly In will be held at the Georgia Tech Learning Center in midtown Atlanta on October 2, 2012. The Hazlehurst-Lamon Award annual dinner, at which we honor a member of the SEBC for a lifetime of achievement in their profession, will be held on the evening before the Fly-In, also at the Georgia Tech Learning Center. Last year the winner was Eleanor Banister who has been a long-time member and leader in the SEBC. I encourage you to join us for both dinner on October 1 and for the Fly-In on October 2.

Membership in the SEBC has been highly rewarding for me, both from a personal and a professional perspective. Whether you are new to the SEBC or a long-time member, I encourage you to become actively involved and make the most of what the SEBC has to offer. Please enjoy the conference. I hope to see each of you again at our Fall Fly In!

Sincerely,

JEFF CAPWELL | PRESIDENT

TUESDAY, APRIL 17, 2012

7:30 A.M. – 8:00 A.M.

REGISTRATION AND CONTINENTAL BREAKFAST

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Nelson Mullins Riley & Scarborough LLP

8:00 A.M. – 8:15 A.M. GENERAL SESSION

ROOM: SALON III

CONFERENCE OPENING & WELCOME

*Jeff Capwell, SEBC President, McGuire Woods LLP,
Charlotte, NC*

*Fred Stewart, Program Chair,
Portfolio Evaluations, Inc., Atlanta, GA*

8:15 A.M. - 9:15 A.M. GENERAL SESSION

ROOM: SALON III

INSIDE THE BELTWAY: WHAT IS GOING ON?

*Edward Ferrigno, Vice President, Government Affairs, Plan
Sponsor Council of America, Washington, DC*

The year is just beginning, but the activity inside the beltway is on pace to keep employers and their providers up at night. Ed Ferrigno is a veteran Washington insider and a dynamic speaker who will bring us up to date on developments that are likely to significantly affect employee benefits in the coming years.

Ed will discuss, among other topics, the impact of recently issued fee disclosure regulations and proposed initiatives regarding lifetime income options. Make sure you bring your questions as Ed has a wealth of knowledge to share.

**9:15 A.M. – 9:25 A.M. ROOM CHANGE
AND CELL PHONE TIME**

9:25 A.M.-10:35 A.M. CONCURRENT SESSIONS

ROOM: SALON III

BENEFITS OUTSOURCING:

HOW AND WHY IN TODAY'S WORLD

*F. Jay Hoder, Co-Founder and Chairman, Benefit Concepts,
Inc., East Providence, RI*

*Elizabeth Peters, RHU, CEBS, Southeast Regional Sales
Manager, Benefits Concepts, Inc., Atlanta, GA*

*Amanda K. Scott, Benefits, American Tire Distributors, Inc.,
Huntersville, NC*

*Moderator: Phil Curran, Craford Benefit Consultants,
Charlotte, NC*

Outsourcing benefit administration may not be right for every employer but with the increasing complexity

of benefits administration, it is an issue that needs to be considered by most employers. What functions should an employer look to outsource and when should an employer consider outsourcing? When does outsourcing work successfully? What may be some of the pitfalls and what can employers do to guard against those potential pitfalls?

In this session we will hear from an employer who made the decision to outsource and from a provider. Why did they make the decision to outsource and how did they go through the process of selecting a vendor? And what lessons were learned along the way.

ROOM: SALON II

FEE DISCLOSURE UPDATE – IS EVERYONE READY?

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Trey Higgins, Vice President, Fidelity Investments, Atlanta, GA

Sandra Pappa, Principal, Buck Consultants, A Xerox Company, Pittsburgh, PA

Moderator: Jim Hill, Regions Trust, Atlanta, GA

Two new and important fee disclosure rules take effect this year: the service provider fee disclosure rules and the participant-level fee and investment related disclosure requirements. The rules create a host of compliance and administrative considerations for service providers and employers alike. This timely session will review techniques for service providers and employers to consider how to satisfy these novel new disclosure requirements. This is a “not to be missed” session for especially for employers.

9:25 A.M.-10:35 A.M.

ROOM: SALON I

ASK THE EXPERT: HEALTHCARE

John Hickman, Partner, Alston & Bird LLP, Atlanta, GA

Moderator: Martin Sheffield, Natter & Fulmer P.C., Birmingham, AL

While the Supreme Court heard oral arguments in late March on the constitutionality of the Obama health care act, employers and health care providers must continue to stay abreast of new regulatory developments and prepare for compliance with upcoming requirements. John Hickman, a well known expert in the field of health care legislation and reform, will bring us up to date on topics such as 2012 Form W-2 reporting of the cost of employer health coverage and how to comply with new summary of benefits and coverage requirements. John will also spend a portion of the session taking your questions so bring your questions to this informative and timely session.

10:35 A.M. – 10:45 A.M. ROOM CHANGE AND CELL PHONE TIME

10:45 A.M. – 11:55 A.M. CONCURRENT SESSIONS

ROOM: SALON III

WELLNESS INCENTIVES AND WELLNESS SCOREKEEPING

*Niki Oldham, Vice President, Human Capital Practice, Willis Insurance
Services, Atlanta, GA*

Sherrie Weller, Welfare Benefits Manager, Willis North America Inc., Nashville, TN

Moderator: Bill Danish, Willis Group, Atlanta, GA



Measuring and defining wellness incentives and results have become increasingly complex, with premium incentives including smoker surcharges, body mass, and participation as well as credits available for deductibles, HRA and HSA funding. What are the most effective price-setting strategies to achieve different objectives, what are best practices in administering them and what kind of results can be tracked?

The speakers - a consultant and an employer - will explore these topics and present a case study with real life results.

ROOM: SALON II

INVESTMENT UPDATE AND THE ROAD AHEAD

Anthony D. Werley, CIO, JPMorgan Endowments & Foundations Group, JP Morgan Chase, New York City, NY

Moderator: Gloria Carlson, GIA Partners, LLC, New York, NY

What does the economic road ahead look like? Attend this session to get the latest update for 2012 and beyond. Some of the topics to be addressed are:

- What is the right asset mix for managing long-term risk?
- Do alternative strategies play into the mix in today's and tomorrow's environment?
- What is the impact on your investment policy statement for your DC/DB/Endowment or Foundation?

This will be an enlightening session from someone with a broad background to answer your questions and provide food for thought about the "Road Ahead."

ROOM: SALON I

FIDUCIARY ROLES AND RESPONSIBILITIES: CREATION AND DELEGATION OF FIDUCIARY AUTHORITY

James "J" Laschinger, Senior Vice President, Alliant Retirement Services, Alpharetta, GA

Tobin R. Walls, Esq., Mazursky Constantine LLC, Atlanta, GA

Moderator: Cynthia Wright, Rheem Manufacturing Company, Atlanta, GA

With a growing number of lawsuits against plan fiduciaries, it is becoming more and more critical that plan fiduciaries understand the full extent of their authority and responsibilities. Not understanding these responsibilities or failing to delegate them properly can expose fiduciaries to a host of potential liabilities.

To help plan fiduciaries understand and appreciate their obligations, this presentation will focus on how ERISA fiduciary authority is created, assigned and delegated. This session will outline the legal background for these rules and provide a consultant's perspective on how these rules are, and should be, implemented by committees and other plan fiduciaries. Finally, the presenters will discuss strategies for shielding companies, Boards and individuals from potential fiduciary claims. This session is critical for anyone serving on a benefits committee for their employer.

11:55 A.M. TO 12:05 P.M. ROOM CHANGE AND CELL PHONE TIME



Conference Agenda

12:05 P.M. TO 1:30 P.M. GENERAL SESSION LUNCHEON WITH SPEAKER

ROOM: SALON III

ARE YOU LIVING YOUR HEALTHIEST LIFE?

Jeffrey T. Arnold, Chairman and CEO, Sharecare, Atlanta, GA

Jeff Arnold, founder of WebMD, HowStuffWorks.com and his most recent venture, Sharecare, will discuss his thoughts on how being a more informed consumer with digital access to targeted tools and experts can help you live a healthier life. He will address topics such as:

- The future of healthcare and its delivery in light of increasing consumer awareness.
- The role of social media in healthcare.
- As employers continue to educate employees to become better consumers, what is the potential role for websites such as Sharecare?
- The impact of the media on patient drug preferences.
- How technology will likely affect the delivery and education of healthcare for individual consumers and for employees in employer-provided health plans

Jeff will share his thoughts on where technology will take us in the delivery and education of healthcare affecting us as individuals and as employees. Don't miss this visionary share his thoughts on the future facing us.

1:30 P.M. – 1:50 P.M.

ROOM CHANGE AND CELL PHONE TIME

1:50 P.M. – 3:00 P.M. CONCURRENT SESSIONS

ROOM: SALON III

SOCIAL MEDIA VERSUS HR AND BENEFITS

Elizabeth Byerly, Director, Rewards, Talent and Communication, Towers Watson, Atlanta, GA

Jon Neiditz, Partner, Nelson Mullins Riley & Scarborough LLP, Atlanta, GA

Moderator: Elizabeth Cook, TSYS, Columbus, GA

Employers want to use social business to engage employees. How do they achieve success and engagement in today's business environment?

We will hear from a panel with a consultant from a major





Conference Agenda

consulting firm and an attorney as they explore the opportunities and challenges in this new paradigm of today's business. Join the conversation.

1:50 P.M. – 3:00 P.M.

ROOM: SALON II

ERISA LITIGATION: AN UPDATE ON RECENT CASES AND ACTIVITY

W. Bard Brockman, Partner, Bryan Cave LLP, Atlanta, GA
Karen E. Toth, Senior Counsel, Retirement Plan Services, Lincoln Financial Group, Radnor, PA

Moderator: Jason Key, Lincoln Financial Group, Charlotte, NC

ERISA lawsuits are a fact of life. Health and retirement benefits are an important part of an employee's compensation. Yet the laws that govern them are complex and far from easy to understand. It is the interpretation of these benefits that are at the crux of the matter. Has the information been correctly communicated in a manner that an employee can depend on the information to make a decision?

This session will bring us up to date on some important new cases and will review how employers can protect themselves from similar claims. Plan to attend this session to learn from recent court cases and pending cases. You will come away with the knowledge to help minimize your chance of an ERISA related lawsuit.

ROOM: SALON I

ASK THE EXPERT: INVESTMENT DISCUSSION

Kelly A. Bryant, Manager, Global Investments, The Coca Cola Company, Atlanta, GA
Michael Lubin, Senior Vice President, LCG Associates, Inc., Atlanta, GA

Frederic "Rick" Nelson, Chief Investment Officer, Commonfund, Wilton, CT

Moderator: Gloria Carlson, GIA Partners, LLC, New York, NY

Over the past 4 years, employers, money managers and consultants have been faced with unprecedented challenges and opportunities.

This session brings together three nationally recognized

leaders in their respective fields who will share their insights and opinions on some of today's more complex investment and retirement issues, and to answer your questions.

Ask the Expert is one of the most highly rated and informative sessions at the SEBC. Bring all of your questions and join us for a lively discussion.

3:00 P.M. – 3:10 P.M. ROOM CHANGE AND CELL PHONE TIME

3:10 P.M. – 4:45 P.M. GENERAL SESSION

ROOM: SALON III

BENEFITS FROM THE EMPLOYER PERSPECTIVE

R. Keith Lolley, Corporate Director, Human Resources, Carastar Industries, Inc., Austell, GA

Cary R. Shealy, Benefits Manager, Human Resources, Blackbaud, Inc., Charleston, SC

Jim Soggs, Vice President, Human Resources, Republic National Distributing Company, LLC, Atlanta, GA

Clyde Baucom, Vice President, Human Resources, Raycom Media, Montgomery, AL

Moderator: Susan Rosenbleeth, Buck Consultants, Atlanta, GA

These employers represent very different industries. Yet, many of the issues they face in offering benefits to their unique employee populations are the same. How do they approach this? What do they do to increase the retirement readiness of their employees? What do they do to control healthcare costs? Are they ready for the fee disclosure rules, healthcare reform and the myriad of other regulations and bulletins issued by the various agencies?

Do retirement and health/welfare benefits get a "seat at the table" with the "C" suite? How do they communicate benefit issues with the "C" suite? What about their benefits and investment committees? What are some of their best practices?

Bring your questions; there will be time for an open dialogue!

4:50 P.M.

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**5:00 P.M. TO 6:30 P.M. CLOSING RECEPTION
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Speakers Bios

JEFFREY T. ARNOLD

Jeff Arnold is the Chairman and Chief Executive Officer of Sharecare, an interactive social expert QA platform launched in October 2010 by he and Dr. Mehmet Oz in partnership with Harpo Studios, Sony Pictures Television and Discovery Communications. Sharecare is designed to greatly simplify the search for quality healthcare information and provide consumers with the necessary tools to make smart health choices and live healthier lives.

In 2007, Jeff orchestrated the sale of HowStuffWorks.com for \$250 million to Discovery Communications, where he served as Chief Digital Strategy Officer and Chief Architect of The Curiosity Project, www.curiosity.com, until December 2011.

Prior to HowStuffWorks.com, he founded and served as CEO of WebMD Corporation, the first healthcare company to harness the power of the Internet to create a destination for consumers, healthcare institutions and physicians to find trustworthy medical information. Before founding WebMD, Jeff started Quality Diagnostic Services (QDS), which he grew into a leading cardiac arrhythmia monitoring company, ultimately selling the company to Matria Healthcare for \$25 million in 1998.

CLYDE BAUCOM

Clyde Baucom is Vice President - Human Resources for the 45 television stations, 3,500 employees, and Raycom Sports Division that comprise Raycom Media.

Clyde joined Raycom Media as its second employee in January 1997 after spending 10 years as Vice President - Human Resources for Multimedia, Inc. which had 12 TV and radio stations, 14 newspapers, 600,000 cable subscribers, and 3 syndicated television programs (Sally Jessy Raphael, Jerry Springer and Phil Donahue). Previously, he was Director of Human Resources with Karastan-Bigelow Carpet Company, and Assistant HR Director with Liggett and Myers Tobacco Company until those companies were acquired.

With 40 years human resources experience, Clyde holds an HR degree from The University of North Carolina (Chapel Hill) and has served as President (1999) and Board Member of the Southern Employee Benefits Conference, President of Junior Achievement of Greenville, SC, Board Chairman of the Roper Mountain Science Center, and HR Committee Chair for the Southern Newspaper Publishers Association.

W. BARD BROCKMAN

Bard Brockman is a partner with the national firm of Bryan Cave. He devotes the bulk of his practice to ERISA and fiduciary litigation. In the ERISA context, Bard typically represents employers, plan sponsors, plan administrators, individual fiduciaries, and independent trust companies.

He has broad experience in handling class actions, fiduciary claims, prohibited transaction claims, benefits claims, ESOP and

stock valuation disputes, subrogation claims, and government investigations.

Bard received his undergraduate and law degrees from the University of Florida. He and his wife have two teenage sons, and they live in the Emory neighborhood of Atlanta.

KELLY A. BRYANT

Kelly Bryant is the Manager of Global Investments in the Office of the Treasurer at The Coca-Cola Company. Kelly has worked with retirement plan investments in the Coca-Cola system for nearly nine years. She joined The Coca-Cola Company in October of 2010 through the Company's purchase of the North American operations of Coca-Cola Enterprises Inc. Her current responsibilities include certain asset classes of the various retirement plans (fixed income, quantitative equities, multi-asset strategies, real estate, Canadian equities and timber), 401(k) investment structure, Global Retirement Savings Plan and the Canadian retirement plans. She also serves as the Chair of the Canadian retirement committee.

Immediately before joining the Coca-Cola system, Kelly was a quantitative analyst for the State of Georgia Investment Division. Prior to that, Kelly spent over five years with Invesco Capital Management where she served in various roles: quantitative analyst (fixed income and equities), portfolio trader and equity portfolio management (quantitative and fundamental).

Kelly holds a Bachelor of Science in Business – Marketing degree from the University of Idaho.

ELIZABETH BYERLY

Elizabeth Byerly serves as the Director, Communication and Change Management at Towers Watson's Southeast Communication and Change Management practice within the Talent, Rewards and Communication Segment.

She has over 20 years of experience, including strategy development and implementation, process design and change management.

Elizabeth has completed a wide variety of assignments, including large-scale health care consumerism; technology implementations involving multiple vendors; executive, global and sales compensation plan communication; full benefits conversions; retirement plan transitions; and change management in mergers and acquisitions. She has significant experience in motivating individuals to learn and take action.

Elizabeth integrates her corporate experience in change management and marketing communication, media relations, process design and mapping, health care service department integration and customer service program design into her consulting assignments. She has won numerous awards for print and video projects. Elizabeth has worked with clients in non-profits and faith-based organizations as well as many other



industries, including: agriculture, auto parts distribution, banking and financial services, energy, engineering, food and beverage, health care, manufacturing, professional services, restaurant, retail, staffing and transportation.

Prior to joining Towers Watson, Elizabeth held a variety of corporate communication, change management and marketing positions. She is a frequent speaker at conferences and has leadership training from Bell Institute in advanced leadership and communication and Adaptive Leadership™ from Cambridge Leadership Associates. Elizabeth holds a B.S. from Colorado State University and an MBA from Georgia State University's Executive MBA program.

EDWARD FERRIGNO

Ed Ferrigno is vice-president, Washington affairs, for the Plan Sponsor Council of America, where he represents member's interests before the federal legislative and regulatory community. Ed has extensive experience in human resources management and government relations in both the corporate and association environment.

He is responsible for PSCA's successful effort to enact the EGTRRA pension reform legislation in 2001 and in warding off harmful legislation introduced in 2002 in response to the Enron and WorldCom scandals. He played a key role in crafting the pension community's responses to the mutual fund investigations and subsequent SEC proposals concerning the processing of plan-related mutual fund trades and the development of a redemption fee rule.

Ed led PSCA's successful efforts to obtain regulatory and legislative provisions that will remove barriers and provide incentives for automatic enrollment plans. He was also a key player in the effort to make the pension provisions in the 2001 EGTRRA legislation permanent. Both of these issues were included in the Pension Protection Act of 2006.

JOHN R. HICKMAN

John Hickman is head of Alston & Bird's Health Benefits Practice where he leads five attorneys devoted exclusively to HIPAA privacy, flexible benefits, and other health and welfare benefit issues. He has been a pioneer in the consumer-directed health care arena and has worked closely with health plans, financial institutions and employers as well as the IRS, Treasury and DOL in developing guidance for tax-favored health reimbursement arrangements (HRAs) and health savings accounts (HSAs).

John has been listed in The Best Lawyers in America, Super Lawyers magazine and Who's Who Legal in the employee benefits area and has lectured widely and published articles on HIPAA, ERISA litigation, cafeteria and health plan issues. He is co-author of the Cafeteria Plans Manual, HIPAA Portability and Privacy, and Consumer-Driven Health Care (published by the Employee Benefits Institute of America). John has been called upon by benefits and trade associations to testify before the IRS and DOL on issues affecting health and welfare benefit plans including HIPAA, cafeteria plan regulations, DOL claims procedures and the HIPAA health care privacy regulations.

John is an adjunct professor of law at Emory University School

of Law. He is on the editorial advisory board of the Benefits and Compensation Law Alert and the Employee Benefits Adviser, the board of the Employers Council on Flexible Compensation (ECFC), and the publications committee of the Self Insurance Institute of America.

He received his J.D. from Emory University School of Law, graduating with distinction, where he received the Order of the Coif award.

TREY HIGGINS

Trey Higgins is a Vice President with Fidelity Investments' Workplace Investing business unit. Trey has close to 14 years experience in the financial services industry with the majority of that time being focused on the defined contribution business.

Trey earned a B.A. from University of Kentucky and an MBA from Xavier University. In addition, he served in the United States Marine Corps and received an honorable discharge. Trey is married with 3 children and in his spare time enjoys triathlon, martial arts, mountaineering and tennis.

F. JAY HODER

Jay Hoder, co-founder and Chairman of the Board of Benefit Concepts, Inc. He earned his BA from Wesleyan University and MBA from Wharton School, University of PA.

He has over 30 years' experience in the insurance and employee benefit fields. Jay is a Certified Pension Consultant (CPC) and Chartered Life Underwriter (CLU).

JAMES "J" LASCHINGER

J Laschinger is Senior Vice President and practice leader of the Alliant Retirement Services Division for Alliant Insurance, Inc. in Atlanta. He holds his Registered Investment Advisor with NASD's General Securities Representative License, Uniform Securities Agent State Law License, and Registered Investment Advisor License (Series 7, Series 63 and Series 65) along with his insurance licenses. J has over 14 years of experience in the investment consulting arena.

J is responsible for the qualified plan consulting services business which focuses on managing the fiduciary liability for their clients by following a disciplined approach. This includes creating the Investment Policy Statement, conducting ongoing investment reviews, performing customized vendor searches, and other consulting work that presents itself on a daily basis for his clients.

Prior to joining Alliant, J was a Principal at Mercer Defined Contribution Advisors in Atlanta. J managed the Atlanta DC Advisor office where he worked in the same capacity as he does now with Alliant. J also worked on Wall Street for UBS and Morgan Stanley in their respective headquarters in New York City.

J was born in Ottawa, Canada and was an All-American athlete on the varsity tennis team for the University of Georgia where he earned his degree. He now lives in Atlanta with his wife, Leslie, and their two young daughters.



R. KEITH LOLLEY

Keith Lolley currently serves as the Corporate Director of Human Resources at Caraustar and has over 30 years experience as a Human Resources professional including 19 years with Fort James Corporation (formerly James River Corporation) and the last 12 years with Caraustar Industries, Inc.

His experience includes health & welfare plans management, retirement plans, labor relations, employee relations, training & development, performance management, safety, change management, acquisition & divestiture due diligence, and work teams facilitation.

Keith serves on the Caraustar health care and retirement plans committees. He holds a B.S. Degree in Personnel Management and Industrial Relations from Auburn University.

MICHAEL T. LUBIN, CFA

Michael joined LCG in 1996 and is a member of the Board of Directors. At LCG, he is a Senior Vice President and Principal responsible for multiple client relationships and is a leader in LCG's manager research and analytical software development. He also is a member of the Investment and Risk Management Committees. Currently, Michael works with several corporate clients.

In 2002, Michael began work as a portfolio specialist at Barrow, Hanley, Mewhinney & Strauss, Inc. In 2004, Michael re-joined LCG. Michael was previously a Consultant and Investment Analyst with Mercer Investment Consulting, Inc., where he specialized in asset allocation and asset/liability studies, investment manager research and selection, and performance evaluation.

He studied at Kansai Gakuin University in Japan and earned a B.B.A. in Finance (magna cum laude) from Southern Methodist University and an M.B.A. from Emory University. Michael is a CFA charterholder and a member of the CFA Institute and CFA Society of Atlanta.

JON NEIDITZ

Jon Neiditz is a partner in Nelson Mullins Riley & Scarborough's Atlanta office and founder and co-leader of the Firm's rapidly growing Information Management Practice. Jon is known nationally for developing and implementing cost-effective information governance and management programs that effectively address the risks, costs and opportunities associated with electronic information -- including in communications, collaboration and networking technologies; cloud computing and e-records management -- and as a trusted advisor on data management issues. He has particular depth in the areas of health (as one of the most experienced HIPAA/HITECH attorneys and consultants), financial, educational and other types of personal information, and is best known as a zealous manager of data breaches and related risks. He also helps organizations manage their digital assets, opportunities and issues more generally, as they find their place in the read/write, big data world.

Jon serves as Chair of the Board of the Georgia Charitable Care Network. He holds a BA, magna cum laude, from Dartmouth College, and a JD from Yale Law School.

FREDRIC "RICK" NELSON

Rick joined Commonfund in 2011 and as Chief Investment Officer has oversight of Commonfund's equity and fixed income programs as well as the outsourced solutions business. Rick chairs the Commonfund Investment Policy and Asset Allocation Committee.

Before joining Commonfund, Rick was Vice Chairman and Chief Investment Officer of ING Investment Management Americas, New York, NY, where he led more than 300 professionals managing over \$165 billion in assets. He was responsible for client and ING proprietary capital in traditional, private equity and hedge fund asset classes. Rick was a member of ING Investment Management Committee, Insurance Americas Asset Liability Committee, ING Group Management Council, and Director, ING Mutual Funds. While at ING he created the Multi-Asset Strategy and Solutions Group which combined asset allocation, liability modeling, risk management and financial engineering skills to deliver consultative solutions and multi-asset portfolios for clients.

Before that, Rick was Managing Director, Head of U.S. Equity for JP Morgan Investment Management, New York, NY. He led 120 professionals managing over \$90 billion in assets. Rick was responsible for institutional and retail client assets in quantitative and fundamental active strategies across all-cap ranges and styles. He was also a member of JPMIM Management Committee. Prior to his role at JP Morgan Investment Management, he was with Bankers Trust Company for 13 years, most recently as Managing Director and Head of the Quantitative Investments Group. In this capacity he led a team of 13 professionals and initiated the group's entry into cutting edge active quantitative strategies.

Rick earned an M.B.A. from the University of Chicago and a B.S. in Business from the University of Pennsylvania, Wharton School of Business.

NIKI OLDHAM

Niki is Vice President in the Human Capital Practice of Willis Insurance Services and serves as a financial account executive. She is a key member of the Strategic Accounts team. Her areas of focus include client management and service, data analytics, efficiency studies, and innovative solution research. Niki provides client specific financial, account management, strategic consulting services and data-driven decision making support to both local and national employer groups.

In addition to her local responsibilities, Niki also operates as a national resource for Willis clients who require specialized data analytics, customized reporting, strategic planning, and projects related to the assessment and design of innovative solutions. Niki is a graduate of Georgia Institute of Technology with a Bachelor of Science degree in Industrial Engineering

SANDRA PAPPA

Sandy Pappa is a Principal in the Retirement practice of Buck Consultants' Pittsburgh office. She has more than 20 years experience in administration and consulting on defined contribution plans. Depending on the particular client situation, her work includes: re-design and implementation of retirement



programs to meet changing business and workforce needs; providing ongoing support with administration and operations to establish and maintain best practices within defined contribution programs; non-discrimination testing and compliance reviews; and 403(b) and 401(k) vendor search assistance.

Prior to joining Buck in 2007, Sandy spent 19 years with Mercer where she was Principal and Midwest Zone leader in the Defined Contribution Specialty Business.

Over the past 10 years, Sandy has focused on plan re-design and implementation of retirement programs; non-discrimination testing and compliance reviews; consulting support to establish and maintain best practices with administration and operations within defined contribution programs; and vendor management. Sandy's most recent engagements include leading a merger of two large 401(k) plans (40,000 participants and 2.5B in assets) from design to implementation of the new 401(k) program for a large financial institution, a fee benchmarking analysis to determine the total recordkeeping fees paid by participants and assist in negotiating a fee reduction for a mid size energy company, and a compliance review for a generic pharmaceutical company.

Sandy has a Bachelor of Science, Business Administration and Management from La Roche College, Pittsburgh, PA and serves as the Treasurer of the Governing Board and Advisory Board member for Pennsylvania Women Work

ELIZABETH PETERS

Liz Peters, Southeastern Regional Sales Manager with Benefit Concepts, Inc, has spent 20 years selling both benefits administration services and group insurance products. She is a graduate of the University of Wisconsin-Parkside and has earned certification as both a Registered Health Underwriter and Certified Employee Benefit Specialist.

Liz has an office in Atlanta, GA to service clients located in Florida, Georgia, South Carolina, North Carolina, Alabama and Mississippi. In this capacity, Liz works with both prospective end user clients and the broker/consultant community.

AMANDA SCOTT

Amanda Scott is a Benefits Specialist at American Tire Distributors, Inc. in Huntersville, NC. In this role, Amanda manages the administration of all of ATD's benefits programs, which include health and welfare, 401(k), disability, COBRA coordination and working with employees through open enrollment on the Employee Resource Center (ERC).

Prior to joining ATD, Amanda worked for Rexam Inc. as a Health and Welfare Benefit Analyst where she maintained, administered and enhanced health and welfare benefit programs and policies. Amanda also worked for INX International Ink Co. as Human Resources/Office Manager. She started her career as a Human Resources Assistant with Windsor Windows and Doors.

Amanda holds a Bachelors of Science Degree in Business from Hollins University and obtained a Certificate in Human Resources.

With over 2,800 employees and growing, American Tire Distributors is the largest independent tire wholesaler in the US. Its offerings include flagship brands Bridgestone, Continental, Goodyear, Pirelli, and Michelin, as well as budget brands and private-label tires. Tires account for some 90% of sales. ATD also markets custom wheels and tire service equipment. Its roughly 80 distribution centers serve independent tire dealers, retail chains, and auto service centers in some 40 states. The company was acquired by private equity firm TPG Capital in 2010.

CARY SHEALY

Cary Shealy currently works as the Benefits Manager with Blackbaud, Inc. in Charleston, SC. Blackbaud employs a workforce of over 2,300 people worldwide, with 2,100 of those being employed across 48 US states.

Cary has over 19 years of experience in Human Resources, Employee Benefits, Risk Management and Corporate Operations.

He received a BS in Business Administration, with a concentration in Human Resources, Industrial Relations, Insurance and Risk Management from the University of South Carolina. In his free time, Cary enjoys cycling, softball, participating in children's and youth ministries at his church, and performing as a vocalist/guitarist in a contemporary Christian rock band.

JAMES P. SOGGS

Over the past twenty five years, Jim Soggs has led human resource organizations across a variety of industries ranging from apparel, beverage alcohol, business process outsourcing, chemical manufacturing, flat glass, and wholesale distribution. Jim currently serves as Corporate Vice President of Human Resources for Republic National Distributing Company, LLC (RNDC) providing strategic and functional leadership to corporate human resource initiatives.

RNDC is the second largest distributor of premium wine and spirits in the U.S. with approximately \$5 billion USD in annual revenues and operations in twenty one states. The Company is currently ranked 74th on the Forbes America's Largest Private Companies list. RNDC was created in 2007 when National Distributing Company (NDC) merged with Republic Beverage Company. Jim originally joined NDC in 2005 as Vice President of Human Resources and was appointed to his current role in 2007.

Jim joined RNDC from Cendian Chemical Logistics, a strategic venture business of Eastman Chemical Company where he was Vice President, Human Resources and Administration. Cendian was a business process outsourcing organization specializing in global logistics management services operating in over 80 countries. Prior to Cendian, Jim was Senior Vice President of Human Resources for Cluett, Peabody & Company, a consumer products organization operating in over 70 countries, where he established a worldwide strategic human resource function. Before joining Cluett, Jim served as Vice President of Human Resources for AFGD, Inc., a wholly owned subsidiary of the Asahi Glass Company, LTS. Jim began his professional career with PPG Industries, Inc. in various human resource roles, assuming ever-increasing responsibilities across multiple business units.



Jim currently serves on the Georgia State University Human Resources Roundtable, is a national member of the Human Resources Planning Society (HRPS), both a local and national member of SHRM and a long-standing member of the Atlanta Human Resources Leadership Forum (HRLF). He was featured in the book *Contagious Success: Spreading High Performance Throughout Your Organization* by Susan Annunzio, where he was recognized for implementing strategies for identifying, nurturing and replicating high performing organizations.

Jim has been certified as a Senior Professional in Human Resources by the Human Resources Certification Institute. He received a Bachelor's Degree in Management from Hiram College and his Master's Degree in Business Administration from Mercer University.

KAREN TOTH

Karen Toth is a part of Lincoln Financial Group's law and compliance team serving as the Senior Counsel of the Retirement Plan Services unit. In this role, she provides advice regarding the development of products and services, marketing and sales to new and existing clients, and compliance issues associated with qualified retirement plans and deferred compensation arrangements.

She focuses on the Internal Revenue Code and ERISA requirements affecting qualified retirement plans (including 401(a), 401(k), 403(b), and 457) and other deferred compensation arrangements. She also advises on fiduciary issues and fee disclosure obligations.

Prior to joining Lincoln, Karen worked for eleven years in private practice, counseling employers and other sponsors of employee benefit plans regarding benefit plan design and administration, and compliance issues. She also represented employers in employee benefit plan IRS and DOL audits. Her practice included counseling clients in the healthcare industry, and non-profit and governmental employers.

Karen holds a Bachelor of Science degree from Miami University in Oxford, Ohio, and a law degree, cum laude, from Temple University in Philadelphia, Pennsylvania. She also earned a master of laws (LLM) degree in taxation, with distinction, from Georgetown University Law Center, along with an Employee Benefits Law Certificate. She has also earned a Senior Professional of Human Resources ("SPHR") designation.

TOBIN R. WALLS

Toby practices in the area of qualified and nonqualified retirement plans with a focus on defined benefit pension plans. He has also assisted several clients with the curtailment of post-retirement medical benefits.

He spends his time focusing on qualified and non-qualified retirement plans, executive compensation arrangements (including 409A issues), executive contracts, employment/severance agreements and change in control agreements. In addition, he also works on equity compensation, ESOP plans and transactional benefits.

Toby graduated magna cum laude from Duke University,

where he was a member of Phi Beta Kappa. He graduated with distinction from Emory University School of Law, where he served as managing editor of the Emory Law Journal.

SHERRIE WELLER

Sherrie is the Welfare Plans Manager for Willis North America, Inc. In this role she is responsible for the day to day administration of the Willis Health and Welfare Plans for over 6,000 US employees.

She has extensive experience in health and welfare plan strategy, design, implementation, and employee communications. Over the past several years, she has overseen the transition of the medical benefits program from a PPO based co-pay design, through the full adoption of Consumer Driven strategies, to its current fully integrated wellness incentive based configuration. During the course of this progression, she has also had to manage the additional complexity of merging the HRH acquisition into the Willis benefit plans.

Prior to joining the HR team she was an Account Service Manager at Corroon and Black, a predecessor company of Willis. Sherrie attended Washburn University in Topeka, Kansas.

ANTHONY D. WERLEY

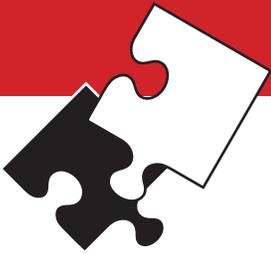
Tony joined J.P. Morgan in 2003 as a Managing Director and is currently the Chief Investment Officer of the firm's Endowments & Foundations Group. Previous to his current role, he was the Global Head of Portfolio Construction within the J.P. Morgan Private Bank.

He has served in management, sales and investment capacities for institutional and private clients for over 30 years. He was an early adopter of alternative strategies in multi-asset class portfolios, and has actively promoted the practice of open architecture portfolio construction around a firm's core competencies.

Prior to joining the firm he was with the Greystone consulting unit within Morgan Stanley as Head of US Transaction Advisory. Earlier in his career, he served as President and co-founder of Asian research and private equity boutique Clarion Capital and was the Global Head of Private Client Services for CS First Boston.

Tony holds a B.A. from Georgetown University and an M.B.A. from New York University.





Mark Your Calendars



June 29, 2012

**Bransford Fundraiser sponsored by Paul Troup
Bondurant Racing School
Phoenix, Arizona**

August 23, 2012

**SHRM - Atlanta - SEBC Joint Benefits Seminar
Cobb Galleria
Atlanta, Georgia**

October 1, 2012

**Hazlehurst-Lamon Award Reception and Dinner
Fall Fly-In Kick-Off
Georgia Tech Hotel and Conference Center
Atlanta, Georgia**

October 2, 2012

**SEBC Fall Fly-In
Georgia Tech Global Learning Center
Atlanta, Georgia**

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